



CAPTRUST Announces Addition of New Jersey-Based Portfolio Evaluations, Inc.

Raleigh, N.C.—January 14, 2022—CAPTRUST Financial Advisors (CAPTRUST) today announced the addition of Portfolio Evaluations, Inc. (PEI). Based in Warren, New Jersey, PEI provides advice, guidance, direction, and education to the fiduciaries of institutional investment programs, including retirement plans, foundations, endowments, and family office groups.

PEI was founded in 1992 and is led by Co-Founders and Partners Attila Toth, Michael Sasso, and Rich Torbinski. The team brings to CAPTRUST more than \$107 billion in assets and several hundred clients.

“At PEI, the cornerstones of our success have been our independence, fiduciary process, and our focus on serving our clients. CAPTRUST aligns well with these core values and will allow us to continue our remarkable track record of growth,” said Toth.

“Over the last 30 years, we have built a reputation based on trust and unmatched client service. Joining forces with CAPTRUST will allow us to build out this solid foundation with additional services like participant advice and expands our expertise in areas like alternatives and nonqualified benefits,” said Sasso.

“We’ve admired PEI for years, and they’ve been a formidable competitor. We are excited for this next chapter and believe coming together as two powerhouses in the independent advisory industry will only serve to make us all stronger,” said Rick Shoff, managing director of CAPTRUST’s Advisor Group.



PEI is the third significant institutional-focused firm that CAPTRUST added in the last year. Previously, CAPTRUST announced the addition of \$154 billion AUA Cammack Retirement Group in February 2021 and \$85 AUA billion Ellwood Associates in August 2021.

This deal closed in late 2021, making PEI the 54th firm to join CAPTRUST since 2006 and the ninth announced for 2021. Consistent with previous firms that have joined CAPTRUST, PEI will take on the CAPTRUST brand moving forward.

About CAPTRUST

Founded in 1997 in Raleigh, North Carolina, CAPTRUST is an independent registered investment advisor. The firm provides investment management, financial planning, estate planning, and tax advisory and compliance for individuals and families. For retirement plan sponsors, endowments, foundations, and religious entities, CAPTRUST offers investment advisory services, fiduciary support, plan design, provider analysis/fee benchmarking, and employee advice programs. With more than 1,000 employees across 60 locations nationwide, CAPTRUST oversees more than \$85 billion in assets under management and more than \$660 billion in assets under advisement (as of September 30, 2021).

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